

Chapter VII: View Orders

Table of Contents

CHAPTER VII: VIEW ORDERS	1
Orders Tab Overview	2
Chart Sections.....	2
Icons on the Orders Tab	3
Filters	4
Personal Filters	4
Orders Tab View Control Panel (Filters) Definitions.....	4
Apply filters	6
Remove Filter.....	9
New Orders	9
Symbols	10
View Order Details	10
Reviewing Order Sets	10
Reviewing the Status History of Orders	11
Personalizing Your Orders View	11
Creating a temporary Orders selection filter	11
Setting your preferences for viewing orders	12

Orders Tab Overview

The **Orders** chart section allows you to review information about orders (including any available results) for a selected patient and to perform order maintenance functions. You can view order information in different formats—according to the department responsible for completing the order, who requested the order, or according to the date and time the order was requested. Using the options in the **View Control Panel (Filters)**, you can specify which orders you want to view. The function buttons at the bottom of the chart section allow you to perform order maintenance functions.

Chart Sections

To display the Orders chart section:

1. Click the **Orders** tab, or, from the **GoTo** menu, choose **Chart Section**, then **Orders**. The **Orders** chart section is comprised of the following:
 - a. The **Display portion** of the window, in the rightmost section of the screen, is where the orders appear based on the display format criteria you select in the **View Control Panel (Filters)**. If more dates or orders are available than can be displayed at one time, scroll bars allow you to scroll the dates or orders into view.
 - b. The **View Control Panel (Filters)**, to the left of the **Display** window, is where you select your criteria for displaying orders.

View Control Panel (Filters)

Display

Function buttons

Medications	Date	Status	Disc/Stop
Pseudoephedrine - 30 mg tablet one tablet (30 mg) by mouth four times daily	10/18/2005	Active	
Inulin Human Regular Inj - 100 Units/mL 2 unit(s) by intravenous push Q15H Start on 10/18/2005	10/18/2005	Active	
Albuterol Oral Inhalation MDI - 90 mcg per inhalation 90 mcg one puff by metered dose inhaler every 2 hours	10/18/2005	Active	
Alum Hydrox/Mag Hydrox/Simethicone - 200 mg/200 mg/20 mg tablet, chewable one tablet by mouth every hour	10/18/2005	Active	
Diazepam Inj - 5 mg/mL 5 mg by intramuscular injection On Call; Start on 10/18/2005 stop after 1 Time	10/18/2005	Active	<TBD>
PRN Acetaminophen - 325 mg tablet one tablet (325 mg) by mouth every 4 hours, PRN as needed for temperature greater than 38.5 May also give for headache	10/18/2005	Active	
PRN Ibuprofen - 400 mg tablet one tablet (400 mg) by mouth every 4 hours, PRN as needed for pain	10/18/2005	Active	
Naproxen - 250 mg tablet 250 mg (one tablet) by mouth 15 minute(s) after Meals	10/18/2005	Active	
Disoxin - 0.125 mg tablet, one tablet (0.125 mg) by mouth once daily	10/17/2005	Active	
IV fluids	Date	Status	Disc/Stop
Lactated Ringers Inj - 1000 mL by intravenous infusion; infuse at 50 mL/hour <Continuous>	10/18/2005	Active	
0.9% Sodium Chloride Inj - 1000 mL	10/18/2005	Active	
Potassium Chloride Inj 40 mEq by intravenous infusion; infuse at 100	10/18/2005	Active	

Un/Suspend... Reorder... Sign... Approve/Verify... Add Specimen... Release... DC/Cancel...












Screen 7.1: Orders Tab






The **Function** buttons, along the bottom of the chart section, allow you to perform maintenance functions for multiple orders.

- **Un/Suspend** - Opens the **(Un)Suspend Orders** dialog box, allowing you to suspend or unsuspend one or more orders for the selected patient.
- **Reorder** - Opens the **Copy/Reorder** dialog box, allowing you to reorder multiple orders. You can also copy the orders from another chart (visit) into the current chart (visit) for reordering.
- **Sign** - Opens the **To Sign** dialog box, where you can sign any orders that need your electronic signature. This button is disabled if no orders require signing, or if you do not have the security rights to sign orders.
- **Release** - Opens the **Release Orders** dialog box, where you can release hold orders. You can release a single order or a batch of orders at one time.
- **DC/Cancel** - Opens the **Discontinue/Cancel Orders** dialog box, where you can discontinue or cancel one or more orders. You can also access the **Discontinue/Reorder Orders** dialog box from this dialog box.

Icons on the Orders Tab


The following icons depict the type of orders displayed.

ICON	Description
	Conditional Order.
	View has been filtered.
	Standard order set. This icon is only available in the Requested by or Requested by Details views.
	Hold order.
	Clinical path in the Requested by or Requested by Details views.
	Order set with a multi-order form. Icon is only available in the Requested by or Requested By Details views.
	Linked order set. Icon is only available in the Requested by or Requested by Details views.
	Linked order set with a multi-order form. Icon is only available in the Requested by or Requested by Details view.
	Discharge order.
	Suspend order.
	Master repeat order. A status of " Active Master Order " is used to identify a Master repeat order. The status is updated to "Repeat Generation Finished" when all repeat occurrences have been generated. The status is updated to "Completed Master Order" when the last occurrence has been completed.

ICON	Description
	Repeat occurrence.
	STAT order.
	PRN order.
	Order has been modified and has a history.
	Order is a member of a linked orders set. This icon is only seen in the By Department and By Department/Status views. A tool tip will appear if you hover over the icon with the mouse cursor.

Filters

You can specify which orders you want to see by screening or *filtering* which orders are to be displayed. A *filter* is a collection of one or more result categories or items. For an order to be displayed, it must fall into the specified category or match the specified order item. A filter enables you to focus on selected orders by "filtering out" orders that don't meet the filter criteria. For example, you can create a filter to display only active or completed orders.

The **Filter** icon  displays at the top left corner of the **Display** window to indicate that the orders are filtered.

Personal Filters

You can set up a user-defined filter which enables you to establish a filter based on criteria you select.

- From the **Orders** tab, select **Preferences, Order Review**. You can add new filters or modify existing user-defined filters.

Orders Tab View Control Panel (Filters) Definitions

- Chart:** There are two drop-down menu options, **All Available** and **This Chart**. At NIH there are two distinctions to understand how these filter settings screen order information.
 - Patients whose first admission as an inpatient or outpatient was prior to August 21, 2004:
 - All Available** includes visit order information dating back to 2004.
 - This Chart** screens order information from August 21, 2004 to the present, regardless of how many times the patient's visit status was changed from one visit type to the other

(inpatient and outpatient). CRIS sees all visits since August 21, 2004 as being part of '**This Chart**'.

2. Patients whose first admission as an inpatient or outpatient was on or after August 21, 2004:
 - a. Both filter settings, **All Available** and **This Chart**, include all information from August 21, 2004 or the first admission date to the present, regardless on how many times the patient's visit status was changed from one visit type to the other (inpatient and outpatient). These two settings yield the same results.
- **Since:** Used to specify a date range for viewing. When you know exact dates, enter the start date in the **Since** field. If there is an end date, enter the date in the **To** field. You can also use pre-defined timeframes from the drop-down list such as one week ago or one month ago. You should not use both options at the same time. Note: If a time frame is used it will change the **Since** date.
 - **Status:** This option lets you view **ALL** information by order status. Other categories available are:
 - Active / Ftr Outpt/Pre-Admt
 - Active/In Process
 - All
 - Completed
 - Discontinued
 - Future Outpt / PreAdmit
 - Suspended Orders
 - Take Home Meds-Active
 - Take Home Meds-All
 - **Order Selection:** This option lets you view **ALL** information by department or category. Other categories are also available:
 - <Temporary Selection>
 - Cardiology
 - Clinical Paths
 - Consults
 - Imaging/Radiology
 - Isolation Orders
 - Laboratory
 - Neurology

- Non-Clinical Paths
 - Nursing
 - Nutrition
 - Order Sets
 - Pharmacy
 - Rehab Medicine
 - Respiratory Therapy
 - Social Work
 - Transfusion Medicine
- **Display Format:** This option gives you multiple ways to view information. The display options are: **By Department**, **By Department/Status**, **Requested By**, and **Requested By details**.

Apply filters

To view orders for:

- The current chart only (see definition of **This Chart** on the previous page).
 1. In the **Chart** drop-down list on the **View Control Panel**, select **This Chart**.
- All available charts (see definition of **All Available** on the previous page).
 1. In the **Chart** drop-down list on the **View Control Panel**, select **All Available**.

To select the date range for viewing orders:

1. In the **Date Range** group box in the **View Control Panel**, do one of the following to provide a **Since** date:
 - a. In the **Since** field, enter a specific date.
 - b. Use the increase/decrease arrows to change the date one day, month, or year at a time.
 - c. Click the calendar arrow and select a date. Select the day after you have selected the month and year.
 - d. Select a pre-defined option from the drop-down list, such as **Start of This Chart**.
2. Do one of the following to provide a **To** date:
 - a. In the **To** field, enter a specific date.
 - b. Click the increase/decrease arrows to change the date one day, month, or year at a time.
 - c. Click the calendar arrow and select a date.

To view orders of a particular status:

- In the **Status** drop-down list on the **View Control Panel**, select the desired filter. For example, **Active/In Process** or **All**.

To view particular types of orders:

- In the **Order Selection** drop-down list on the **View Control Panel**, select the desired filter. For example **All**, **Nursing**, or **Pharmacy**.

Selecting the Display Format for Viewing Orders

You can view a patient's orders according to the department that performs the order, further organized by scheduled date and time within the department (**By Department** and **By Department/Status** views), or according to the entered date and time (**Requested By** and **Request By Details** views).

In all views, you can double-click on an order to display its associated order form.

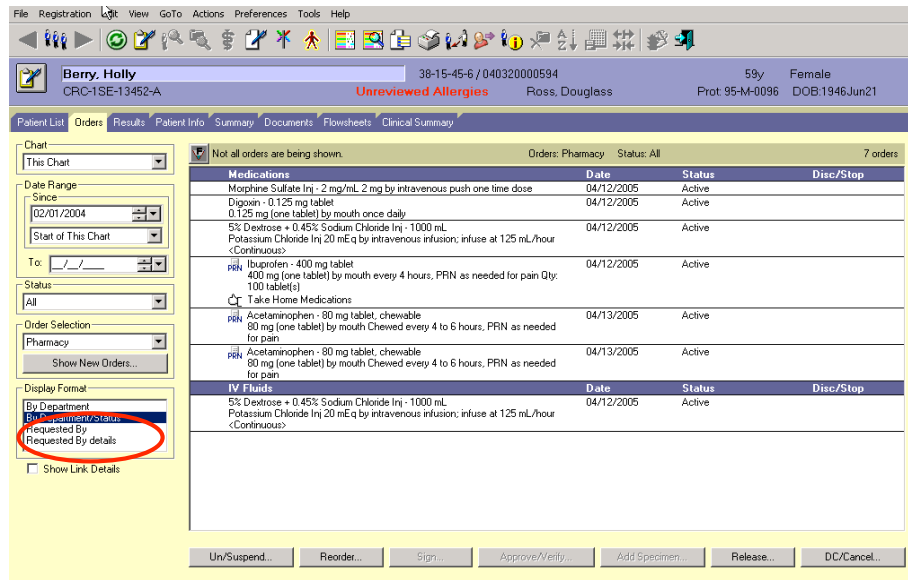
- By Department** Format - The **By Department** view displays all orders according to the department that receives the order, and reports any results. For example, orders for medications are listed under **Medications**, **Glucose orders** are listed under **Chemistry**.

The screenshot shows the CRIS View Orders interface. The top navigation bar includes tabs for Patient List, Orders, Results, Patient Info, Summary, Documents, Flowsheets, and Clinical Summary. The main content area is divided into a left sidebar and a right main panel. The sidebar contains several sections: Chart (with a dropdown for 'This Chart'), Date Range (with 'Since' and 'Start of This Chart' dropdowns and a 'To' date field), Status (with a dropdown set to 'All'), Order Selection (with a dropdown set to 'Pharmacy' and a 'Show New Orders...' button), and Display Format (with options: 'By Department' (selected and circled in red), 'By Department/Status', 'Requested By', and 'Requested By details', plus a 'Show Link Details' checkbox). The main panel displays a table of orders. Above the table, it says 'Not all orders are being shown.' and 'Orders: Pharmacy Status: All 7 orders'. The table has columns: Medications, Date, Status, and Disc/Stop. The table lists several orders, including Acetaminophen, Ibuprofen, Digoxin, Potassium Chloride, and Morphine Sulfate. At the bottom of the interface, there are buttons for Un/Suspend..., Reorder..., Sign..., Approve/Verify..., Add Specimen..., Release..., and DC/Cancel...

Medications	Date	Status	Disc/Stop
pski Acetaminophen - 80 mg tablet, chewable 80 mg (one tablet) by mouth Chewed every 4 to 6 hours, PRN as needed for pain	04/13/2005	Active	
pski Acetaminophen - 80 mg tablet, chewable 80 mg (one tablet) by mouth Chewed every 4 to 6 hours, PRN as needed for pain	04/13/2005	Active	
pski Ibuprofen - 400 mg tablet 400 mg (one tablet) by mouth every 4 hours, PRN as needed for pain Qty: 100 tablet(s) Take Home Medications	04/12/2005	Active	
5% Dextrose + 0.45% Sodium Chloride Inj - 1000 mL Potassium Chloride Inj 20 mEq by intravenous infusion; infuse at 125 mL/hour <Continuous>	04/12/2005	Active	
Digoxin - 0.125 mg tablet 0.125 mg (one tablet) by mouth once daily	04/12/2005	Active	
Morphine Sulfate Inj - 2 mg/mL 2 mg by intravenous push one time dose	04/12/2005	Active	
IV Fluids	Date	Status	Disc/Stop
5% Dextrose + 0.45% Sodium Chloride Inj - 1000 mL Potassium Chloride Inj 20 mEq by intravenous infusion; infuse at 125 mL/hour <Continuous>	04/12/2005	Active	

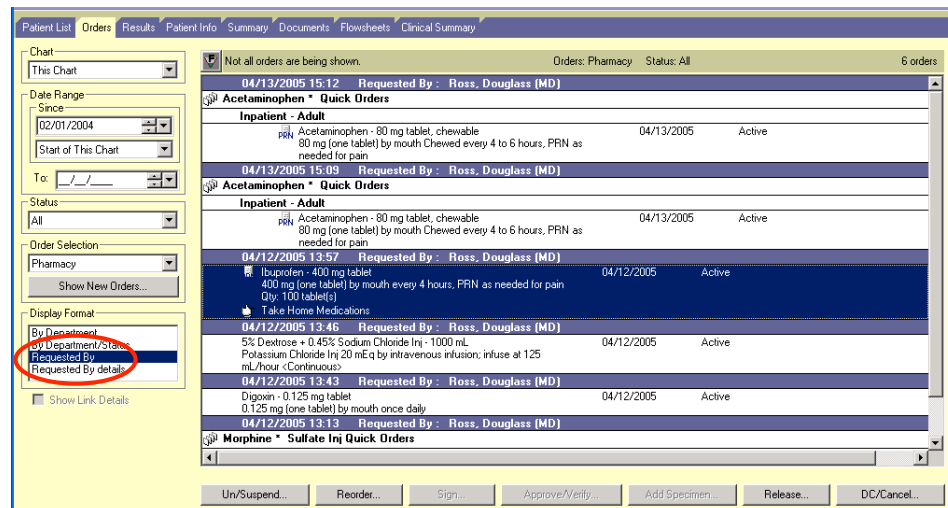
Screen 7.2: By Department Filter

- **By Department/Status** Format – The **By Department/Status** view displays all orders according to the department or type of order. Within a department, all orders are sorted first by **Status** group, then by requested/performed **Date**. This view enables you to visually separate those orders that are completed or discontinued from those that are active.



Screen 7.3: By Department/Status Filter

- **Requested By** Format - The **Requested By** view displays all orders grouped according to the requestor and sorted by the date and time they were submitted to CRIS.



Screen 7.4: Requested By Filter

- **Requested By details** Format - In addition to the details displayed in the **Requested By** view, the **Requested By details** view displays orders

grouped by the date and time that order maintenance functions were performed in CRIS. This includes **Discontinue**, **Cancel**, **Modify**, **Suspend**, and **Unsuspend**. This means that, orders may be displayed many times in the **Requested By Details** view.

The screenshot shows the 'Orders' tab in the CRIS application. On the left sidebar, the 'Requested By' filter is selected and highlighted with a red circle. The main window displays a list of orders for 'Ross, Douglass (MD)'. The orders are grouped by date and time. The first group is '04/12/2005 13:13' with 'Requested By: Ross, Douglass (MD)'. The second group is '04/12/2005 13:43' with 'Requested By: Ross, Douglass (MD)'. The third group is '04/12/2005 13:46' with 'Requested By: Ross, Douglass (MD)'. The fourth group is '04/12/2005 13:57' with 'Requested By: Ross, Douglass (MD)'. The fifth group is '04/13/2005 15:09' with 'Requested By: Ross, Douglass (MD)'. The sixth group is '04/13/2005 15:12' with 'Requested By: Ross, Douglass (MD)'. The orders are listed with details such as 'Morphine Sulfate Inj - 2 mg/mL, 2 mg by intravenous push one time dose', 'Digoxin - 0.125 mg tablet', '5% Dextrose + 0.45% Sodium Chloride Inj - 1000 mL', 'Potassium Chloride Inj 20 mEq by intravenous infusion, infuse at 125 mL/hour (Continuous)', 'Ibuprofen - 400 mg tablet', 'Acetaminophen - 80 mg tablet, chewable', and 'Acetaminophen - 80 mg (one tablet) by mouth Chewed every 4 to 6 hours, PRN as needed for pain'. The status of the orders is 'Active'.

Screen 7.5: Requested By Details Filter

Remove Filter

Once a filter is applied, you can remove it or change to another filter. To remove a filter, change the **Status** selection back to **All**.

New Orders

To view new orders from the **Orders** tab:

1. Click the **Show New Orders** button in the order selection box. The **New Orders** dialog box will display.

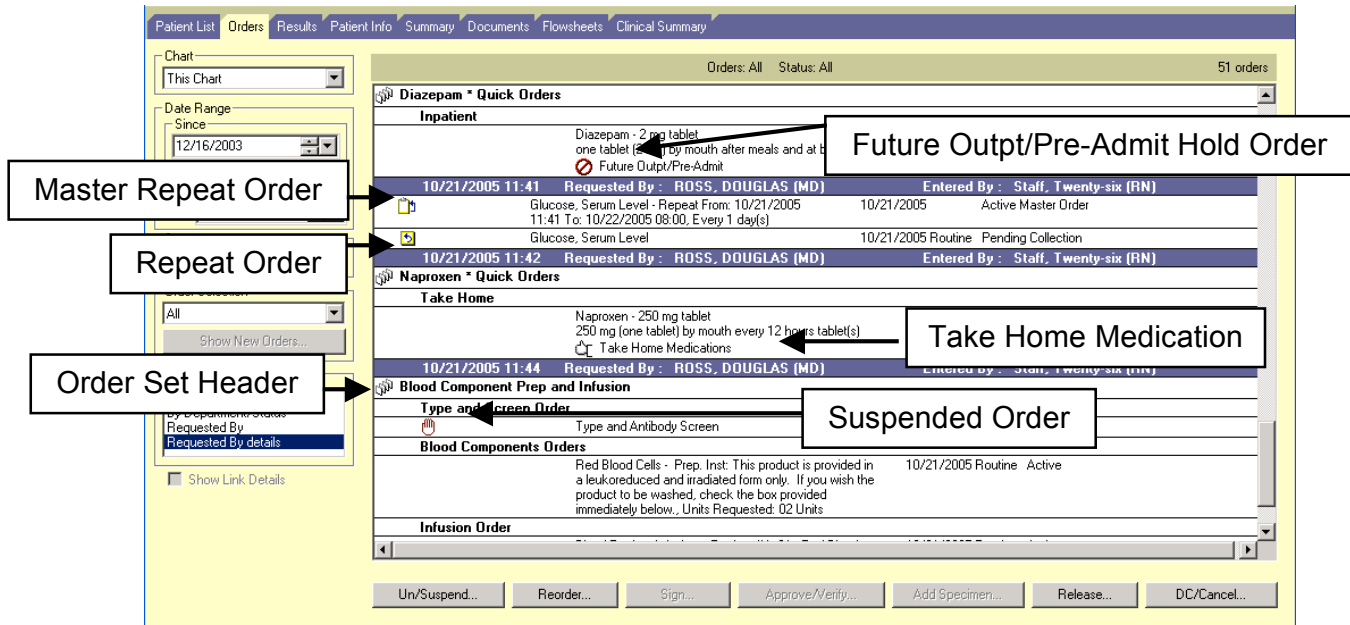
The screenshot shows the 'New Orders' dialog box for 'Berry, Holly'. The dialog box displays a list of orders with details such as date, time, requested by, and status. The orders are grouped by date and time. The first group is '04/11/2005 13:03' with 'Requested By: Green, Mark (MD)'. The second group is '04/11/2005 13:03' with 'Requested By: Green, Mark (MD)'. The third group is '04/11/2005 13:03' with 'Requested By: Green, Mark (MD)'. The fourth group is '04/11/2005 13:03' with 'Requested By: Green, Mark (MD)'. The fifth group is '04/11/2005 13:03' with 'Requested By: Green, Mark (MD)'. The sixth group is '04/11/2005 13:03' with 'Requested By: Green, Mark (MD)'. The orders are listed with details such as 'Blood Gases, Arterial', 'Blood Gases, Arterial', 'Blood Gases, Arterial', 'Blood Gases, Arterial', 'Blood Gases, Arterial', and 'Blood Gases, Arterial'. The status of the orders is 'Final Results'. The 'Clear Flag' button is highlighted.

Screen 7.6: New Orders dialog box

2. To clear the flag, click **Clear Flag** on the **New Orders** dialog box. Otherwise, click **Don't Clear Flag**.

Symbols

Various symbols display on the Orders tab.



Screen 7.7: Orders Tab Symbols

View Order Details

To display details of an entered order, select one of the following alternatives using the **Orders** tab chart section:

- Select the order you want to view details for and from the shortcut / right-click menu, select **View Details**.
- From the **View** menu, select **Order Details**.
- Double-click on the order.

The order form opens in view mode, where you can see all the information associated with the order.

Reviewing Order Sets

You can view order sets in the **Orders** chart section in either the **Requested by** or **Requested by Details** view. An order set is listed in the **Display** window by its name, followed by the orders included in the set. You view details for an order set order the same way you view them for an individual order that is not part of an order set. If section headers are present on the order set, these will also appear on the display.

Reviewing the Status History of Orders

The **Order History Status** from the shortcut menu displays a dialog box which shows a history of all status changes for an order in chronological order.

Note: **Future Outpt/Pre-Admit** ('Hold') orders that have been released no longer display the hold symbol. However, the original hold status can be seen in the **Orders Status History** dialog box. The **Orders Status History** dialog box shows a history of all status changes for an order in chronological order.

ID	Function	Signed	When	Who Entered	Who Requested	Source	New Status	Reason
101	New		4/12/2005 13:13	Ross, Douglass (MD)			Active	Auto Activate.
102	Suspended		10/21/2005 11:23	Staff, Twenty-six (RN)	ROSS, DOUGLAS (MD)	Telephone	Active	Patient having Procedure Performed
103	Unsuspendded		10/21/2005 13:47	Staff, Twenty-six (RN)	ROSS, DOUGLAS (MD)	Verbal	Active	Patient back from Pass

Screen 7.8: Order Status History Dialog Box

To view an order's status history

1. In the **Orders** chart section, select an order.
2. Select the order and from the **View** or shortcut menu, select **History**, then **Status**. The **Order Status History** dialog box opens, listing the statuses for the selected order in chronological order.

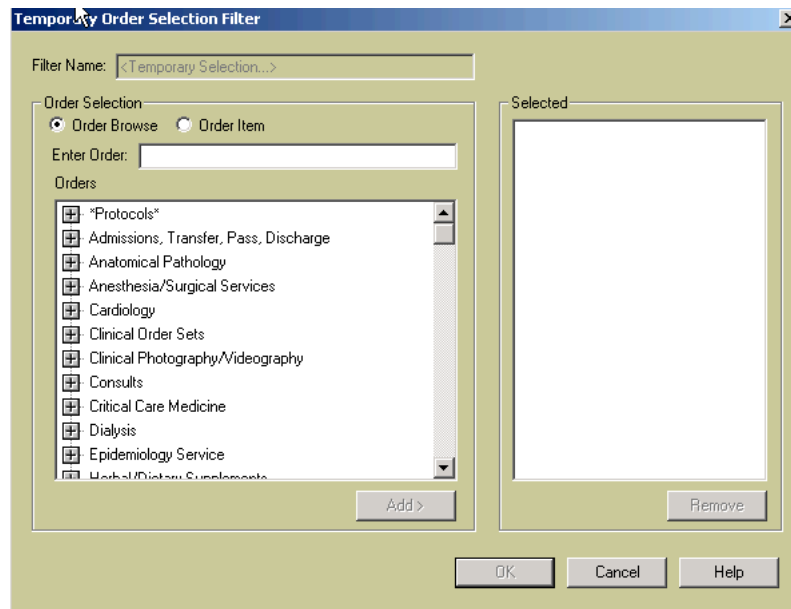
Personalizing Your Orders View

Creating a temporary Orders selection filter

The **Temporary Orders Selection** dialog box allows you to select orders to be displayed in the view on a one-time or temporary basis. This filter is cleared and not saved after you log off or select another filter.

To create a temporary selection filter:

1. From the **Order Selection** filter, select **<Temporary Selection...>**. The **Temporary Order Selection Filter** window displays.



Screen 7.11: Temporary Order Selection Filter Window

2. Highlight the department or subcategory of orders to filter from the list in the **Orders** section, or type the name of the specific test(s) of interest in the **Enter Order** field.
3. Click the **Add** button to move the item to the **Selected** section.
4. Click **OK**. The filtered orders display.

Setting your preferences for viewing orders

The **Personal Orders View Options** dialog box allows you to set up customized, personal preferences for the **Orders** chart section. By setting your preferences, you can view the information important to you in the **Orders** chart section. The three tabs in this dialog box allow you to:

- Create and maintain filters for the status of the orders you want to view (**Status** tab).
- Create and maintain filters for the types of orders you want to view (**Order Selection** tab).
- Specify the default order selection filter and display format for the chart section (**Display Format** tab).

To set personal order view preferences, from the **Preferences** menu, select **Order Review**.

Status tab

The **Status** tab of the **Personal Order View Options** dialog box allows you to select which orders to display in the **Orders** chart section based upon status. It also allows you to set the default **Status** filter to be used when you first open the **Orders** chart section.

To add a new order **Status** filter to the **Orders** tab:

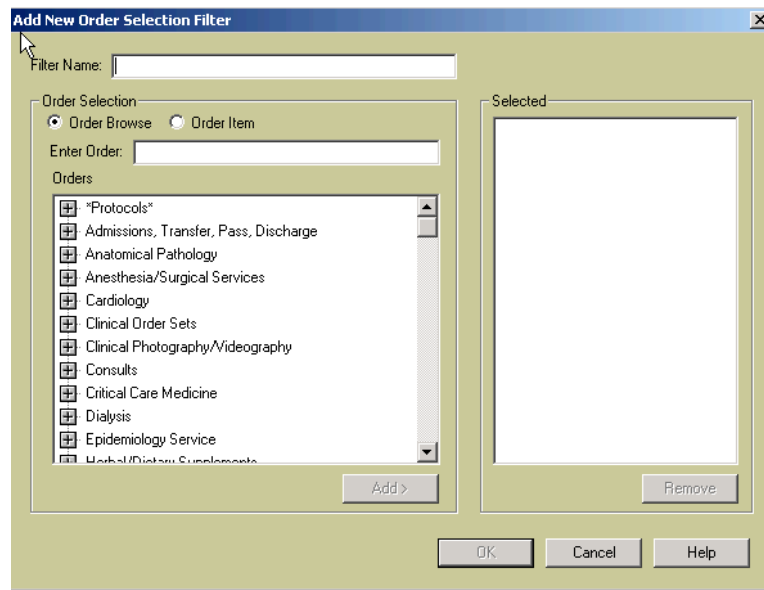
1. With the **Orders** tab displayed, from the **Preferences** menu, select **Order Review**. The **Personal Order View Options** dialog box opens.
2. Click the **Status** tab.
3. Click **Add New**. The **Add New Status Filter** dialog box opens.
4. Enter a name for your new **Status** filter in the **Enter the name of your new filter field**. You can enter a name of up to 25 characters.
5. Do one of the following:
 - a. Click **Any** to view orders of any status.
 - b. Click **Orders Due to Expire** to view orders that are due to expire in x days. (The order must have a stop date for this option to work.)
 - d. Click **Selected** and select the desired statuses from the **Select one of more Statuses** list. To select consecutive statuses, select the first **Status**, hold down **Shift**, and select the last **Status**. You must select consecutive statuses when selecting more than one status.
6. If desired, click the options on the right side of the dialog box to specify how you want to view Suspended, PRN, Discharge (take home meds), and Conditional orders.
7. Click **OK**. If you have entered a duplicate filter name, an error message displays. The new **Status** filter name displays in the **Status** filter in the **Orders** tab.

Orders Selection Tab

The **Orders Selection** tab of the **Personal Orders View Options** dialog box displays the current Orders selection filters. In this dialog box, you can add, change, or delete filters, and choose a default filter for when you display the **Orders** chart section. If you do not choose a default filter, the filter **All** (which cannot be deleted or modified) is the default. You can create a new filter and make it the default, or you can make an existing filter the default.

To add an Orders Selection filter:

1. From the **Preferences** menu, select **Order Review**. The **Personal Orders View Options** dialog box opens.
2. Click the **Orders Selection** tab.
3. To create a new filter, click **Add New**. The **Add New Orders Selection Filter** dialog box opens.



Screen 7.10: Add New Orders Selection Filter Window

4. Type a name for your new Orders filter in the **Filter Name** field.
5. In the **Order Selection** group box, do one of the following:
 - a. Click **Order Browse**. The **Browse** shows a tree structure of Orders groups and items. Select the group or item you want included in the filter. To select sequential groups or items, hold down Shift and click on each choice. To select non-sequential groups or items, hold down Ctrl and click on each choice.
 - b. Click **Order Item**. Enter part or the entire name of the item you want to include in the **Enter Order** field. When you enter part of the name and pause, an alphabetical list of items that begin with the characters you entered displays in the browse window.
6. Select a category or item and click **Add** to place the selected item(s) in the **Selected** window. You can select multiple individual orders or order categories. To delete any groups or items from the **Selected** window, select the category or item and click **Remove**.
7. Click **OK** to return to the **Order Selection** tab.
8. If you want to make the new filter the default, click **Set as Default**.
9. Click **Close** to save the filter and return to the **Orders** chart section. The new filter appears in the **Orders Selection** drop-down list in the **View Control Panel**. If you selected the filter as the default, it will be used the next time you log on and display the **Orders** chart section.

These filters are available for all patients, and will persist across all logon sessions. You can edit and delete filters that have already been created.